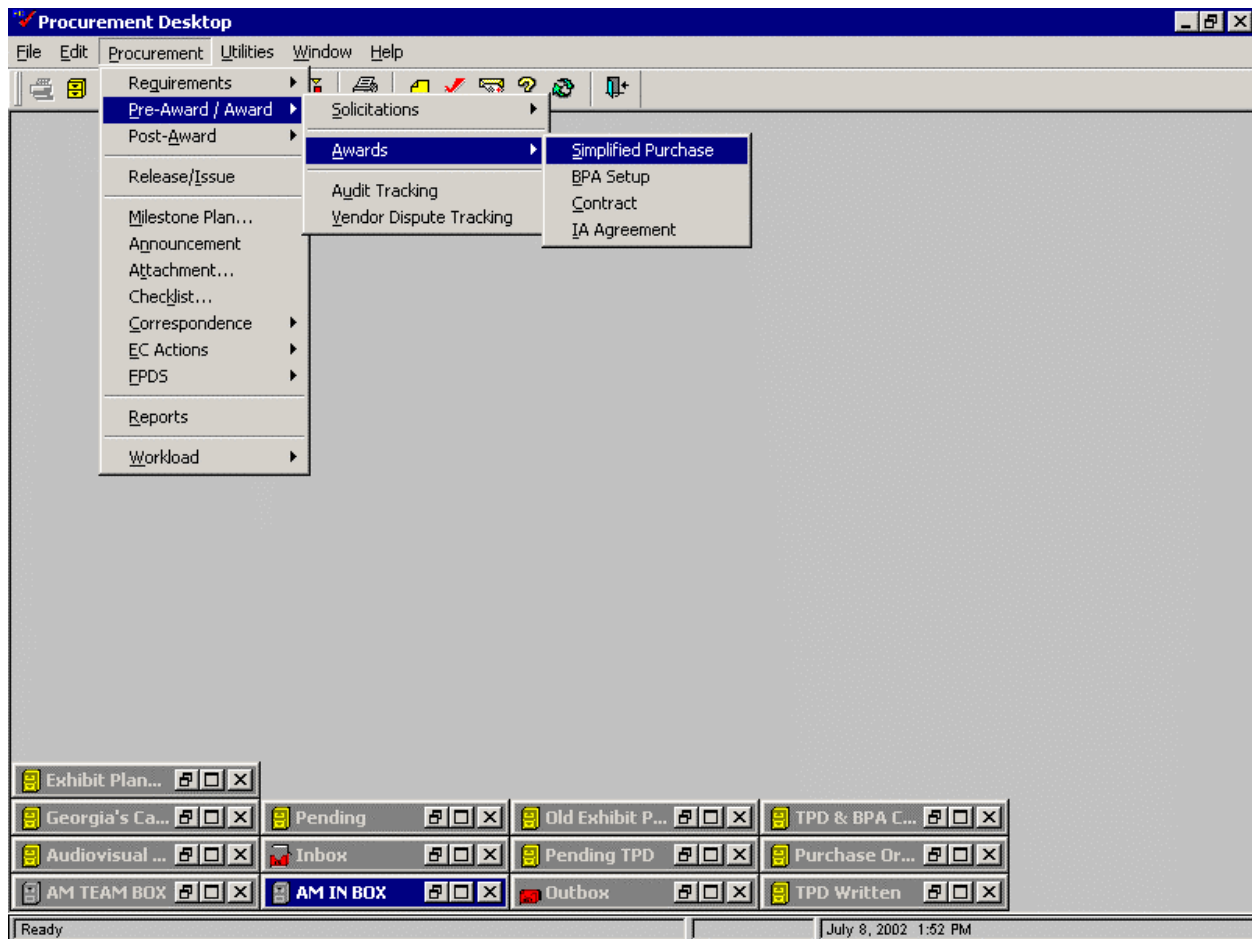## OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP

This appendix prescribes step-by-step instructions for obligating and awarding cooperative agreements, task agreements, and interagency acquisition agreements in Procurement Desktop (PD). Procurement Desktop is the Department of the Interior Electronic Acquisition System (IDEAS) software.

## COOPERATIVE AGREEMENTS:

1.  Create an Optional Form 347 by choosing "Procurement," "Pre-Award/Award," "Awards," and then "Simplified Purchase."

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

|  |  | **Org Code** | **FY** | **Sequential Number** |
|---|---|---|---|---|
| 2. Cooperative agreements are numbered as follows: | **H** | {1 2 5 3} | 0 0 | {0 0 0 1} |

Numbering of the OF-347 is the same.

3. Choose the option "FPDS NOT REQUIRED."



4. Creation of the OF-347 for cooperative agreements is for obligation purposes only. In the Line Item Extended Description block of the OF-347, type in a statement such as "This document serves as the obligation document for Cooperative Agreement Number H_ _ _ _ _ _ _ _ _ _. See attached cooperative agreement for more information."

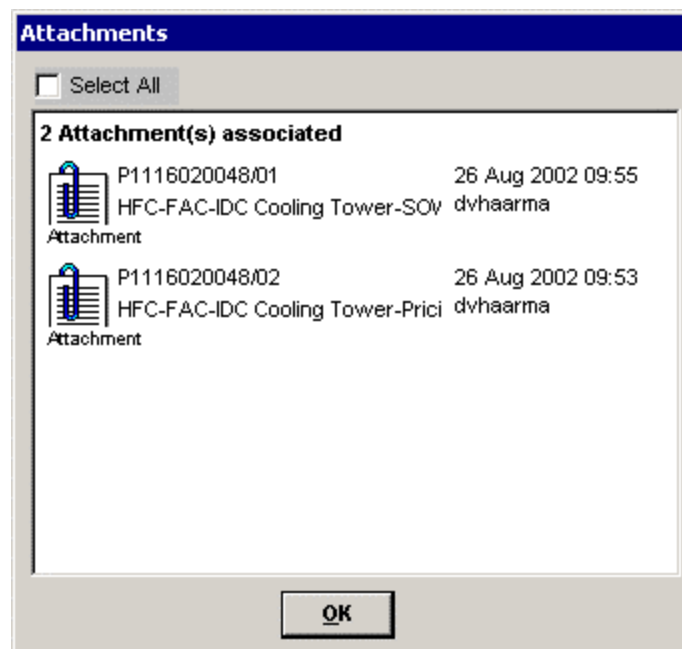**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

5. Attach a copy of the cooperative agreement to the OF-347. Go to "Utilities" and select "Document Import." The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.

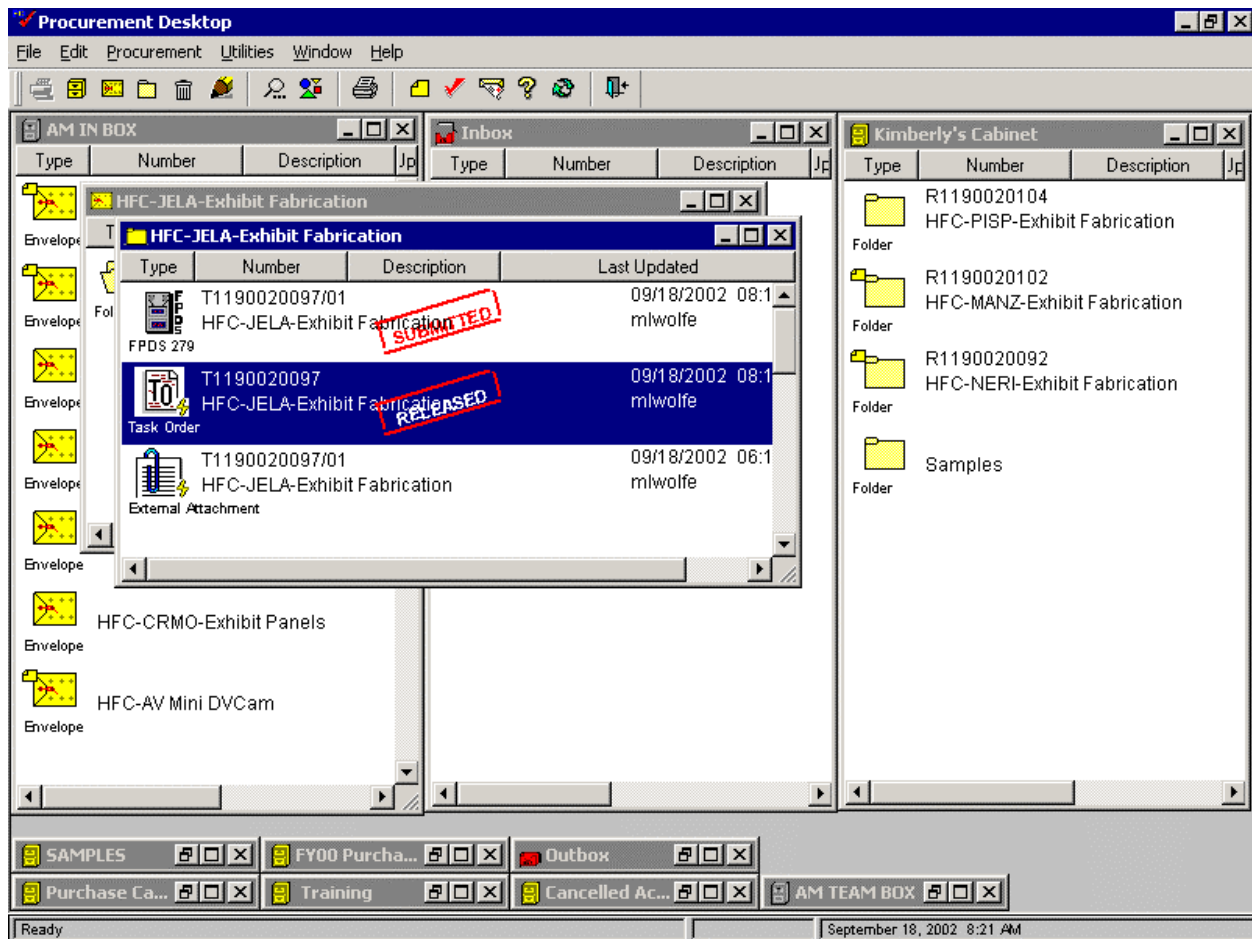**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6. Validate your document for Electronic Commerce transmission by choosing "Procurement," "EC Actions," and then "EC Validate."

7. Once the document has passed EC Validation, electronically submit by choosing "Procurement," "EC Actions," and then "EC Submit."

   You will be prompted for the document(s) that you want to attach to your award document. Highlight all that you want to attach or check the "select all" box if this applies.
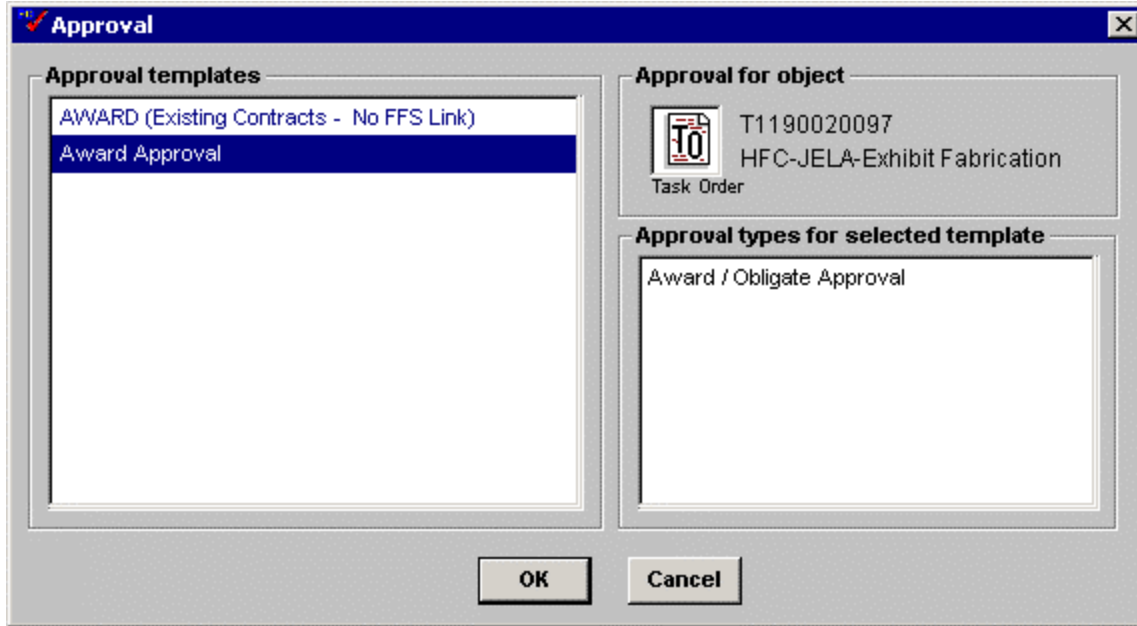
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

8.  Once you click okay, you document(s) will be issued and electronically awarded.  A yellow lightning bolt will appear beside the document(s) that were submitted.
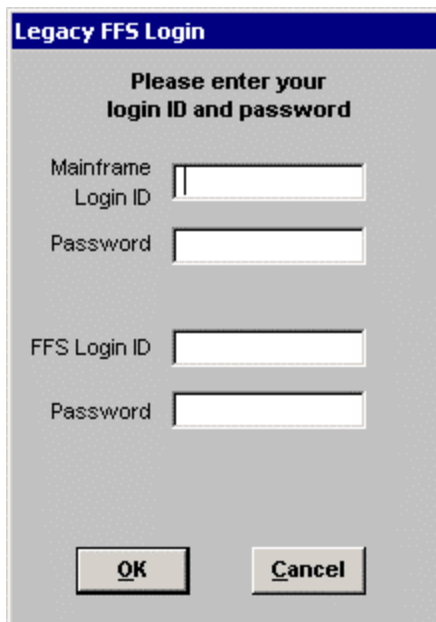
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

9.  Approve using the "Award Approval" option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**TASK AGREEMENTS: USE THESE INSTRUCTIONS WHEN YOU ARE ISSUING TASK AGREEMENTS TO THE COOPERATIVE AGREEMENT TO OBLIGATE FUNDS.**

1. Create an Optional Form 347 by choosing "Procurement," "Pre-Award/Award," "Awards," and then "Simplified Purchase."

|  | Org Code | FY | Sequential Number |
|---|---|---|---|
| 2. Task Agreements are numbered as follows: **J** | {1 2 5 3} | 0 0 | {0 0 0 1} |

Numbering of the OF-347 is the same.

3. Choose the option "FPDS NOT REQUIRED."



4. Creation of the OF-347 for task agreements is for obligation purposes only. In the Line Item Extended Description block of the OF-347, type in a statement such as "This document serves as the obligation document for Task Agreement Number J _ _ _ _ _ _ _ _ _ issued under Cooperative Agreement Number H _ _ _ _ _ _ _ _ _ _. See attached task agreement and cooperative agreement for more information."

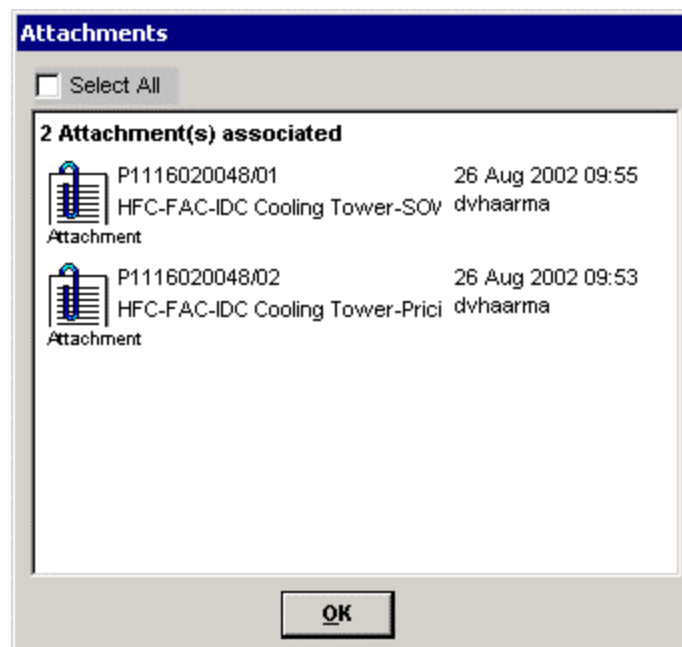**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

5. Attach a copy of the cooperative agreement to the OF-347. Go to "Utilities" and select "Document Import." The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.
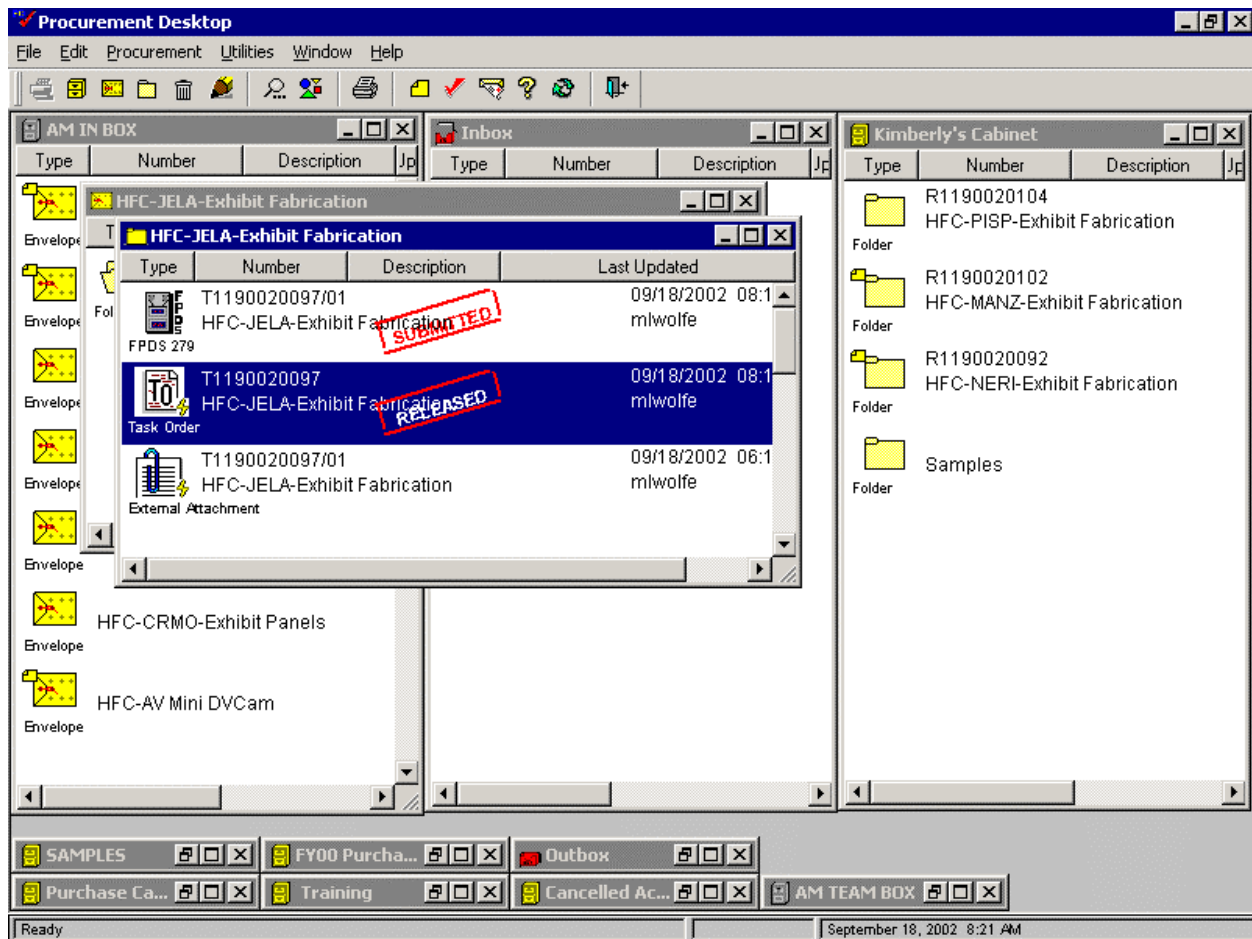
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6.  Validate your document for Electronic Commerce transmission by choosing "Procurement," "EC Actions," and then "EC Validate."

7.  Once the document has passed EC Validation, electronically submit by choosing "Procurement," "EC Actions," and then "EC Submit."

    You will be prompted for the document(s) that you want to attach to your award document. Highlight all that you want to attach or check the "select all" box if this applies.

| Attachments |
| --- |
| ☐ Select All |

**2 Attachment(s) associated**

P1116020048/01     26 Aug 2002 09:55
HFC-FAC-IDC Cooling Tower-SOV dvhaarma
Attachment

P1116020048/02     26 Aug 2002 09:53
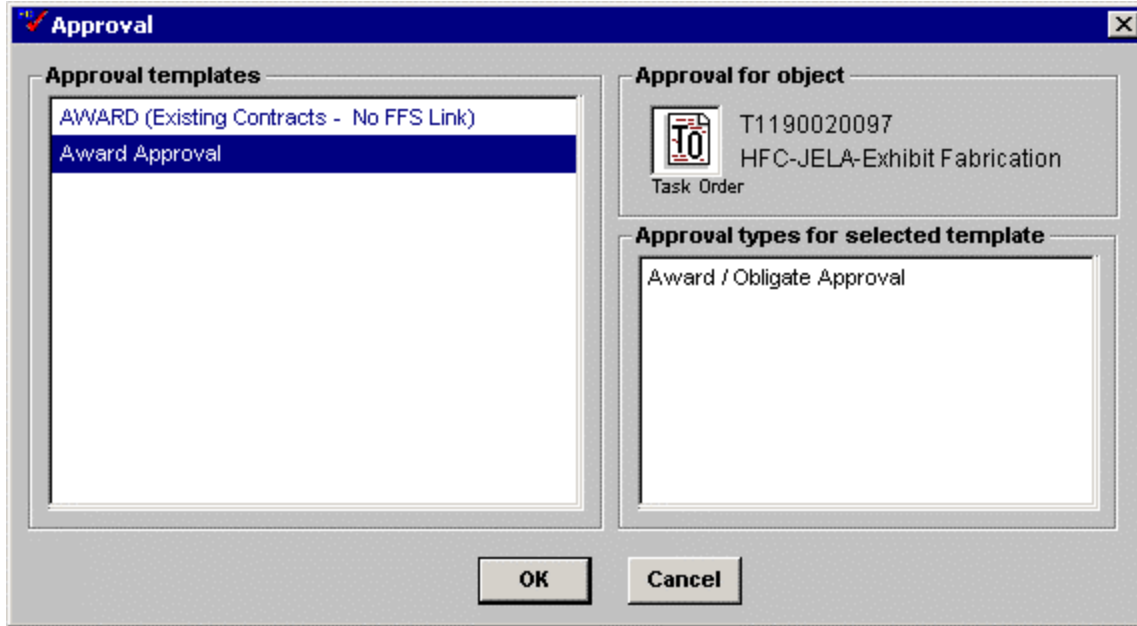HFC-FAC-IDC Cooling Tower-Prici dvhaarma
Attachment

OK

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

8. Once you click okay, you document(s) will be issued and electronically awarded. A yellow lightning bolt will appear beside the document(s) that were submitted.
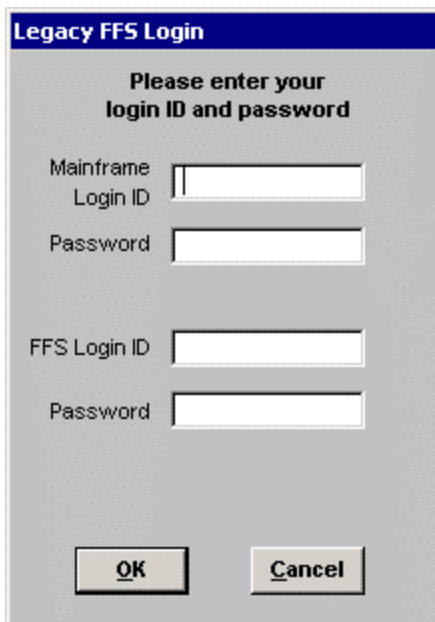
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

9. Approve using the "Award Approval" option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**ANOTHER METHOD -  TASK AGREEMENTS:  USE THESE INSTRUCTIONS WHEN YOU ARE ISSUING TASK AGREEMENTS TO THE COOPERATIVE AGREEMENT TO OBLIGATE FUNDS.**

1.  Create a Standard Form 26, Contract, by choosing "Procurement," "Pre-Award/Award," "Awards," "Contract."

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

|  | Org Code | FY | Sequential Number |
|---|---|---|---|

2. Cooperative agreements are numbered as follows:  **H**   {1 2 5 3}   0 0   {0 0 0 1}
   Numbering of the OF-347 is the same.

3. Choose the option "FPDS NOT REQUIRED."



4. You do not need to complete the entire document nor generate clauses. This document will
   be used only as a document to create and obligate task agreements to the cooperative
   agreement. On the SF-26 the items required to be completed are:

   Item 2, "Contract Number."
   Item 5, "Issued By."
   Item 7, "Name and Address of Contractor."
   Item 12, "Payment will be made by."

   Line Item Description: In this block you can type in a statement such as "Informational
   document for Cooperative Agreement Number H _ _ _ _ _ _ _ _ _ _. See attached
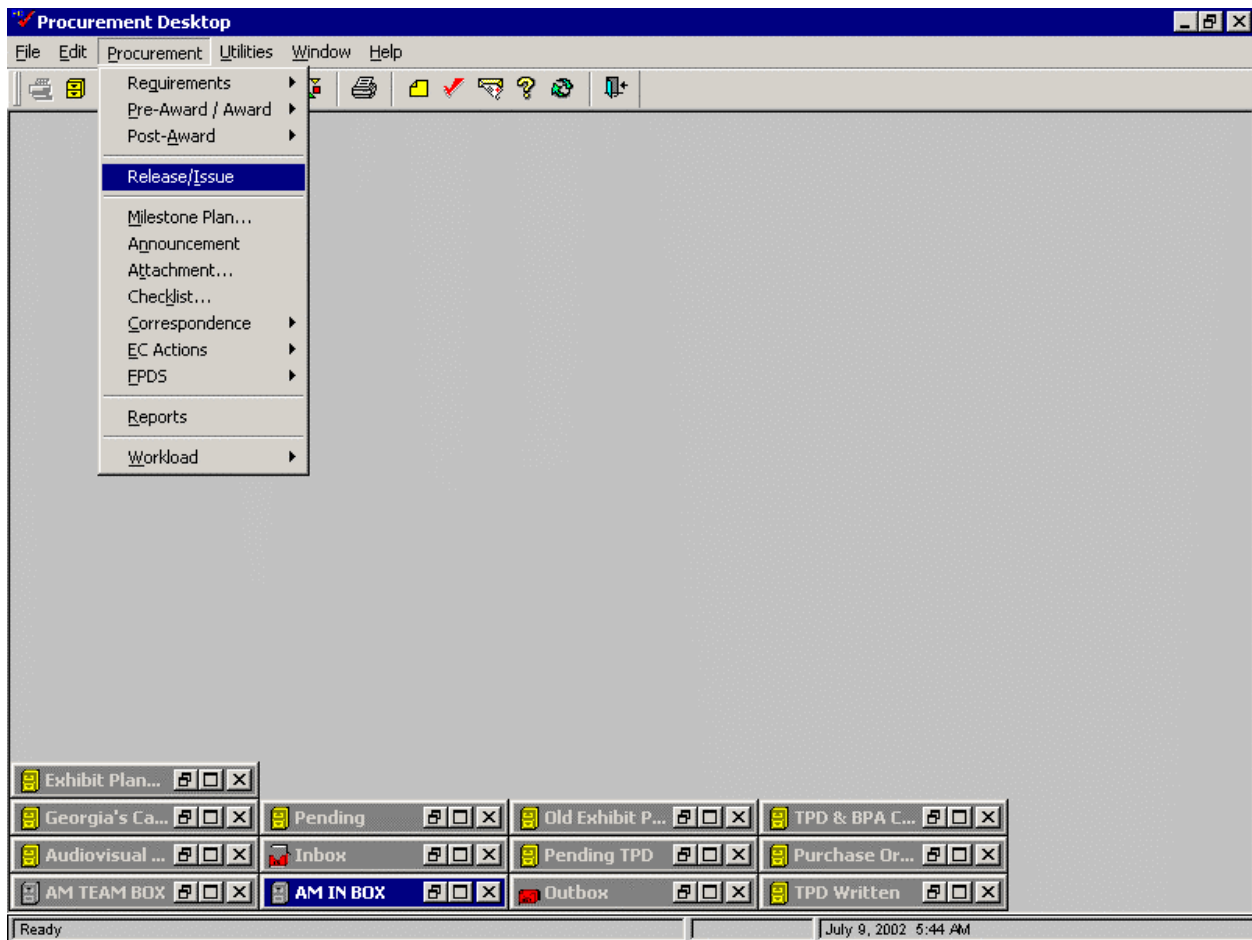   cooperative agreement for more information."

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

5. Approve the document using "AWARD (Existing Contracts - No FFS Link)."
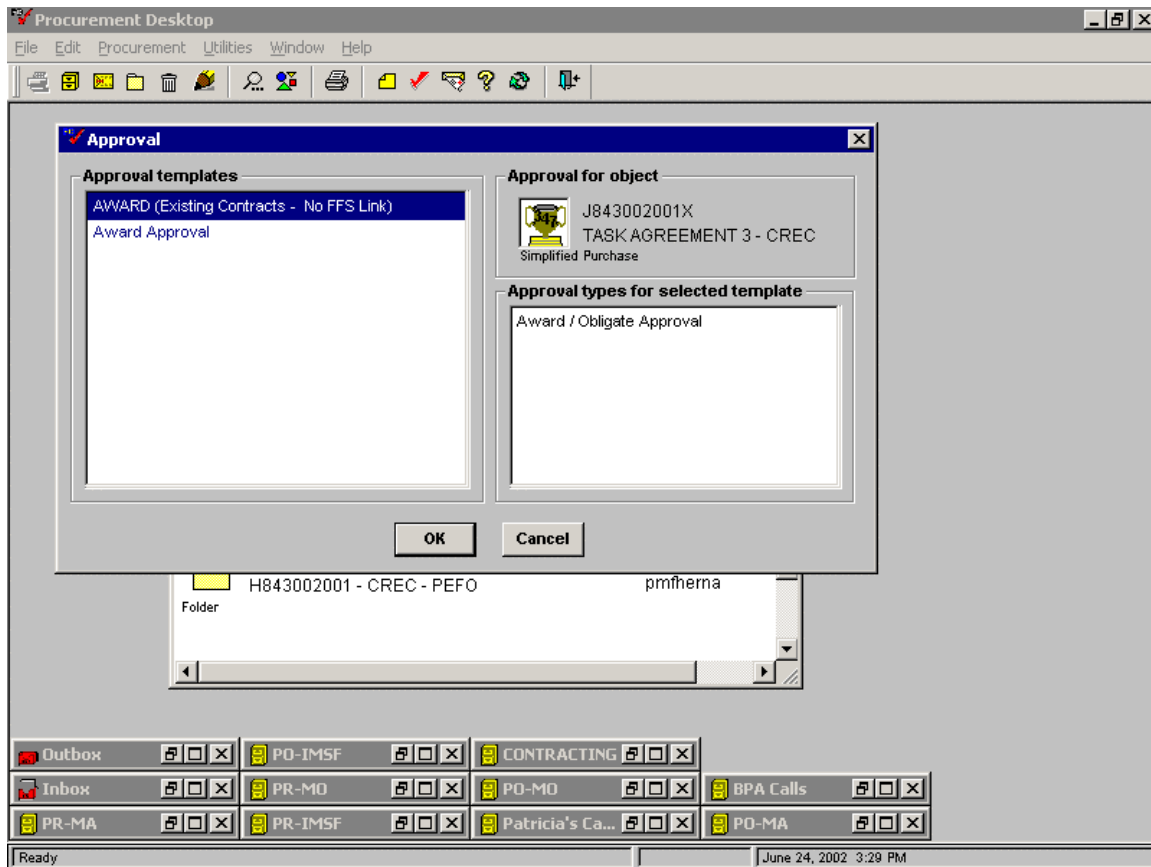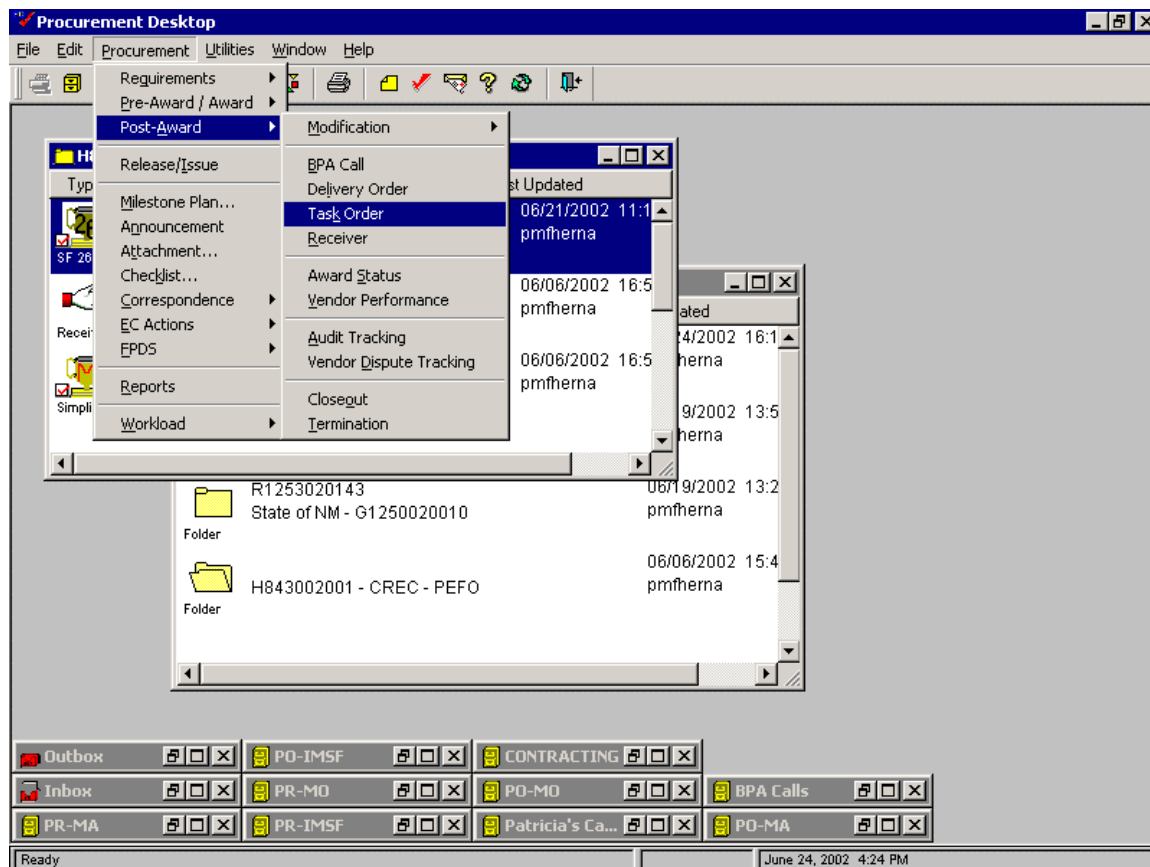
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6. Release the document by choosing "Procurement" and then "Release/Issue."

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**TO CREATE A TASK AGREEMENT AFTER CREATING THE SF-26:**

1.  Highlight the SF-26, Contract, you created for the cooperative agreement. Choose "Procurement," "Post-Award," and "Task Order."

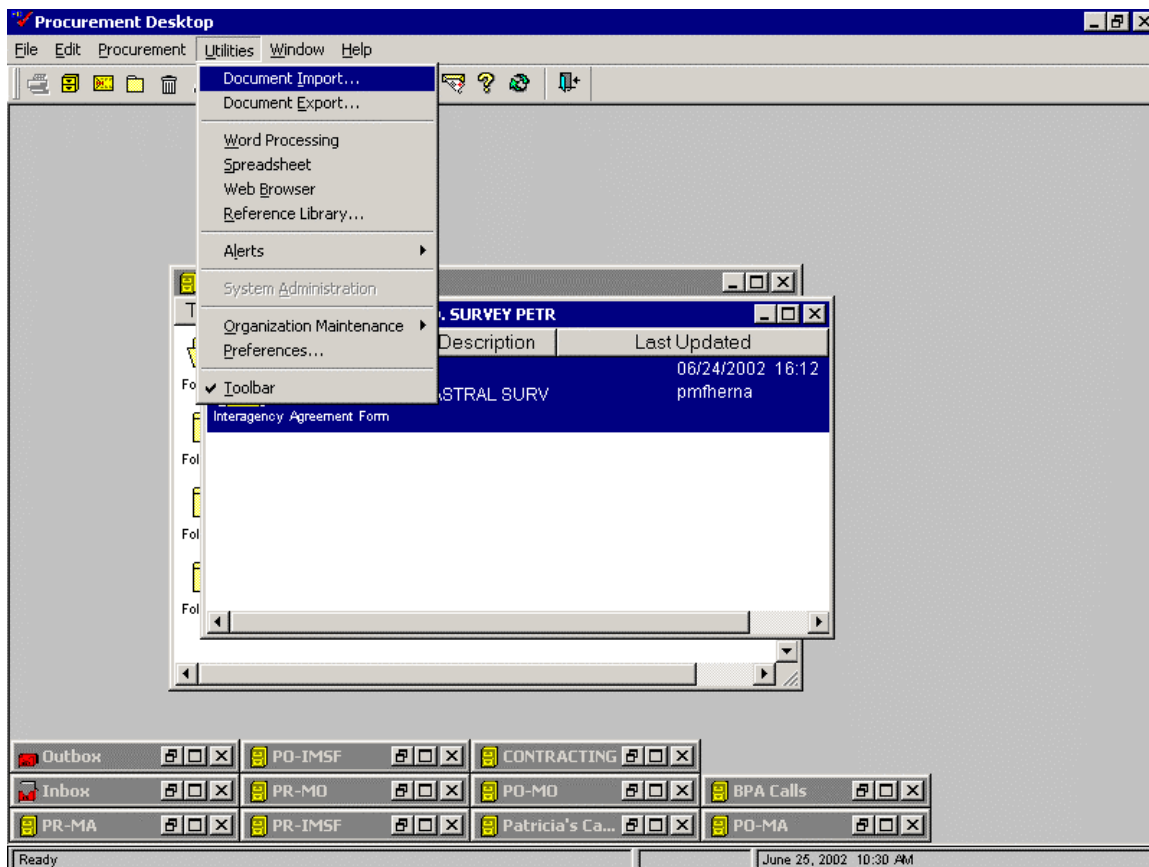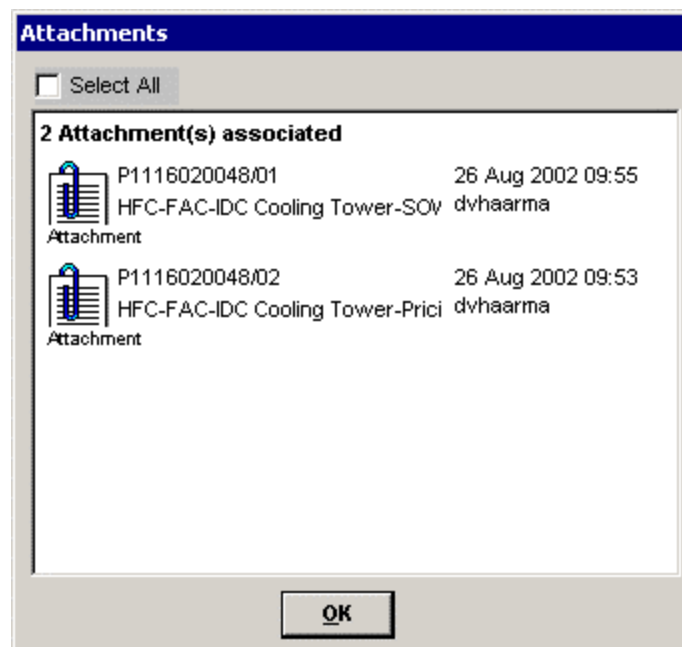**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

|  |  | **Org Code** | **FY** | **Sequential Number** |
|---|---|---|---|---|
| 2. Create a task agreement numbered as follows: | **J** | {1 2 5 3} | 0 0 | {0 0 0 1} |

3. Choose the option "FPDS NOT REQUIRED."
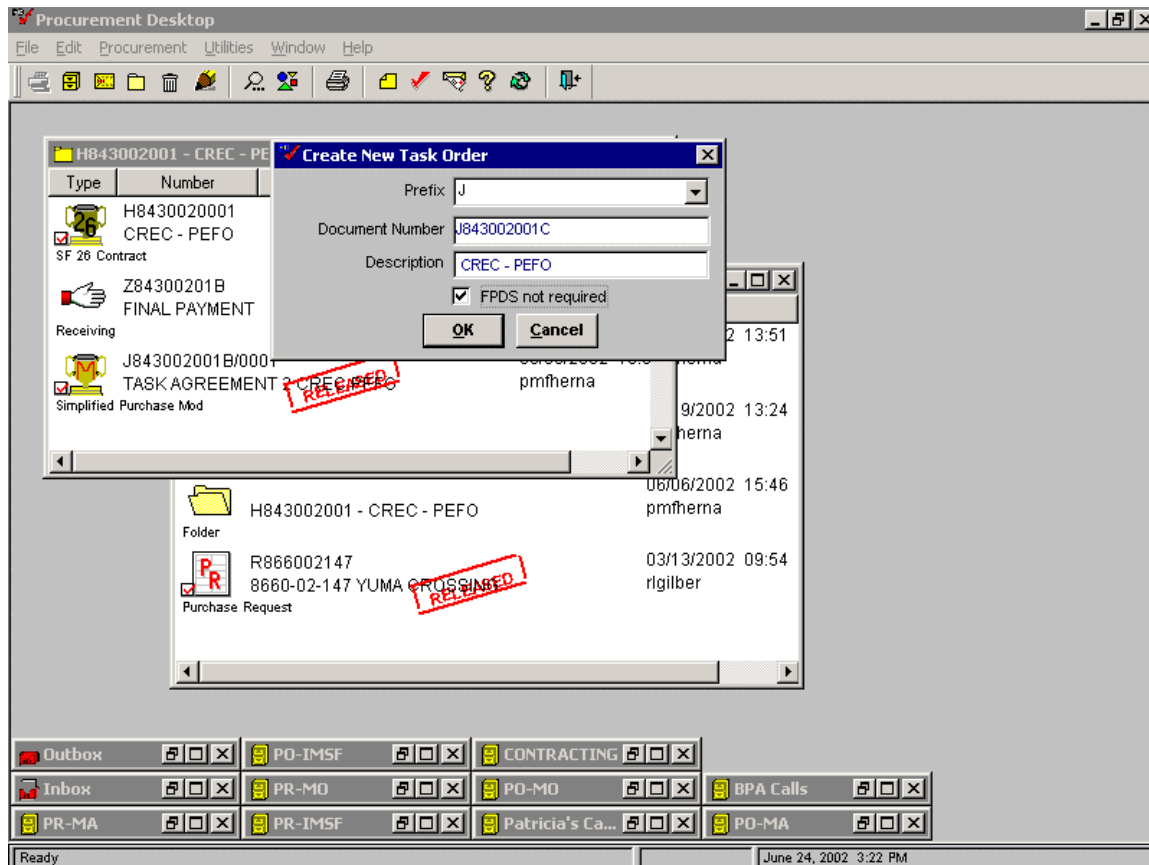


4. Creation of the task agreement is for obligation purposes only. In the description of the task agreement, type in a statement such as "This document serves as the obligation document for Task Agreement Number J _ _ _ _ _ _ _ _ issued under Cooperative Agreement Number H _ _ _ _ _ _ _ _ _ _. See attached task agreement and cooperative agreement for more information."

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

5.  Attach a copy of the cooperative agreement to the OF-347. Go to "Utilities" and select "Document Import." The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.
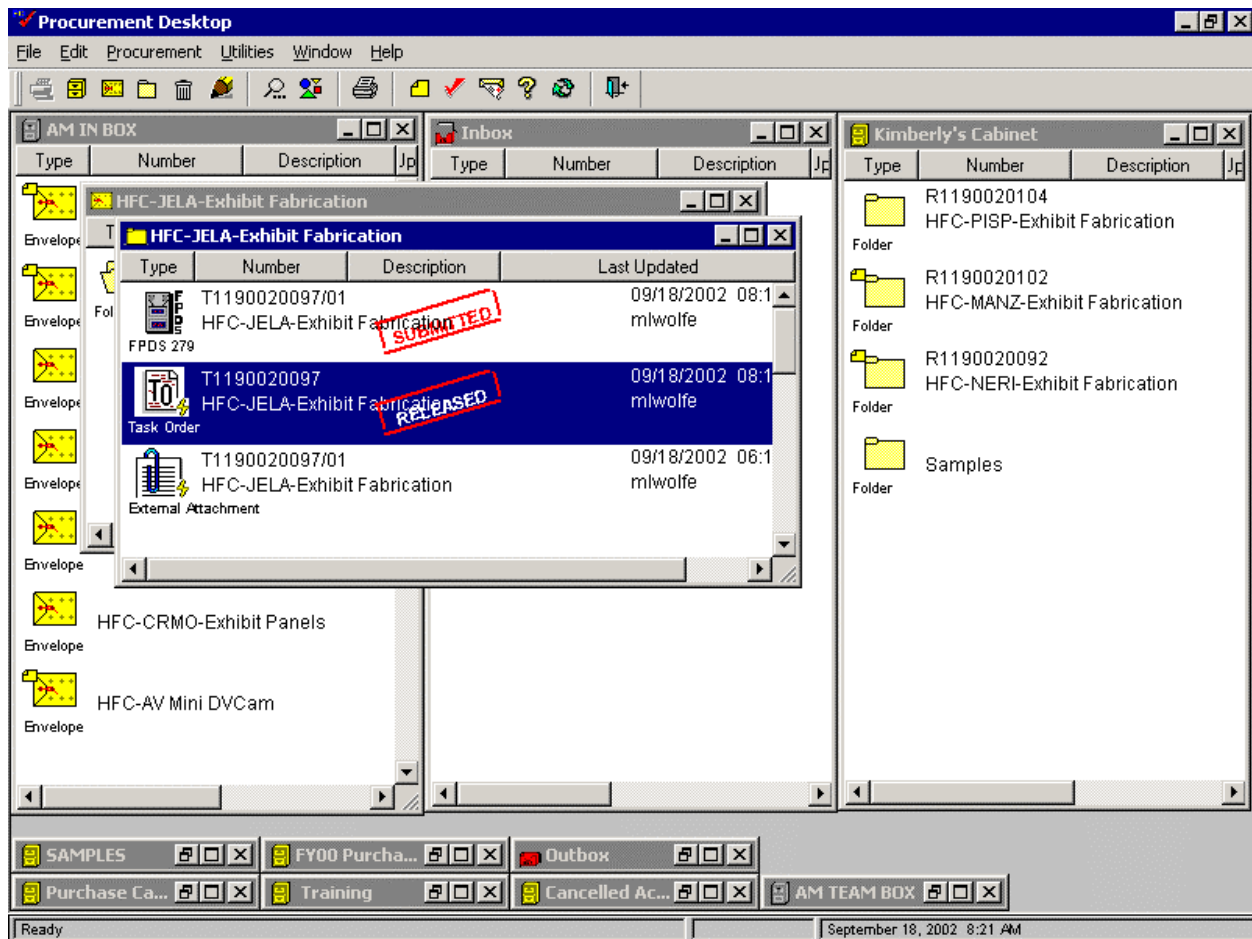
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6. Validate your document for Electronic Commerce transmission by choosing "Procurement," "EC Actions," and then "EC Validate."

7. Once the document has passed EC Validation, electronically submit by choosing "Procurement," "EC Actions," and then "EC Submit."

   You will be prompted for the document(s) that you want to attach to your award document. Highlight all that you want to attach or check the "select all" box if this applies.

| Attachments | | |
|---|---|---|
| ☐ Select All | | |
| **2 Attachment(s) associated** | | |
| P1116020048/01 | 26 Aug 2002 09:55 | |
| HFC-FAC-IDC Cooling Tower-SOW | dvhaarma | |
| Attachment | | |
| P1116020048/02 | 26 Aug 2002 09:53 | |
| HFC-FAC-IDC Cooling Tower-Prici | dvhaarma | |
| Attachment | | |
| | **OK** | |

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

8. Once you click okay, you document(s) will be issued and electronically awarded. A yellow lightning bolt will appear beside the document(s) that were submitted.

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

9.  Approve using the "Award Approval" option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

## INTERAGENCY ACQUISITION AGREEMENTS:

1. Create an interagency acquisition agreement by choosing "Procurement," "Pre-Award/Award," "Awards," and the "IA Agreement."
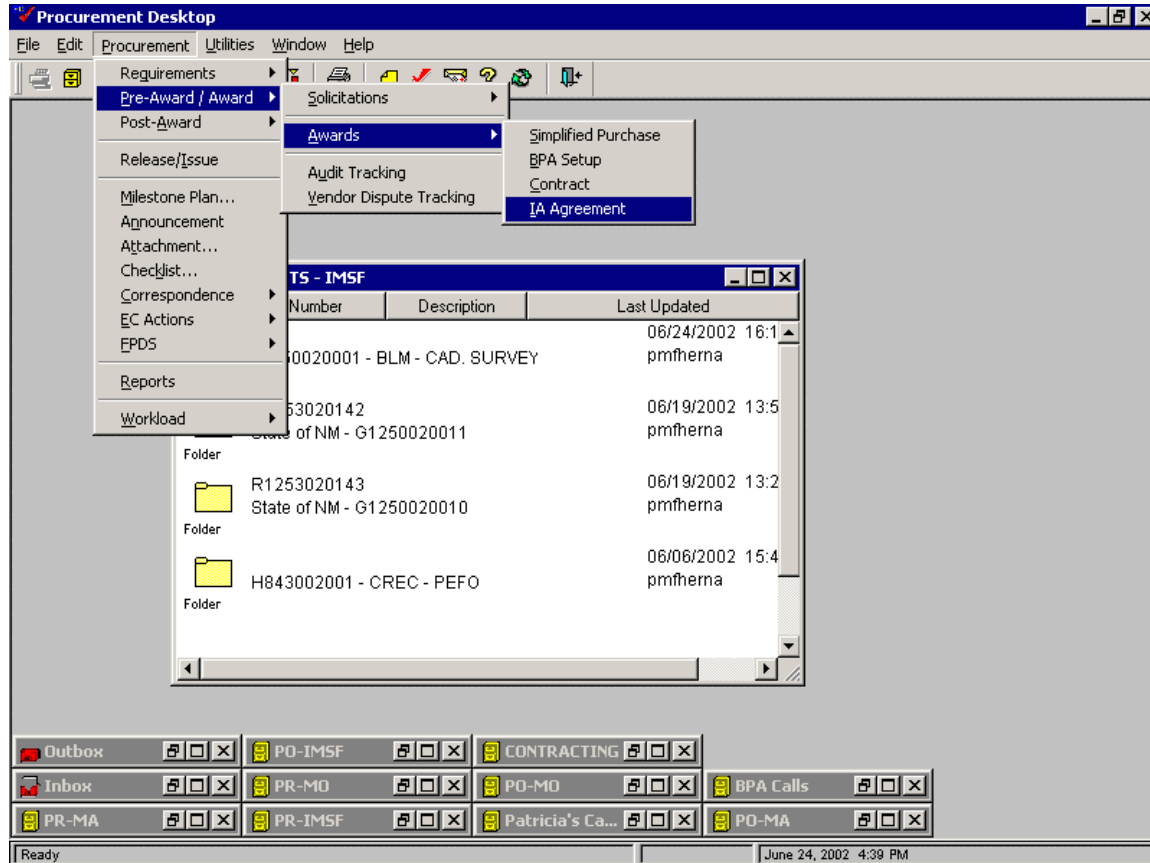
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

2. Interagency acquisition agreements are numbered as follows:

|   | **Org Code** | **FY** | **Sequential Number** |
|---|---|---|---|
| **F** | {1 2 5 3} | 0 0 | {0 0 0 1} |

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

3. Attach a copy of the cooperative agreement to the OF-347. Go to "Utilities" and select "Document Import." The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.
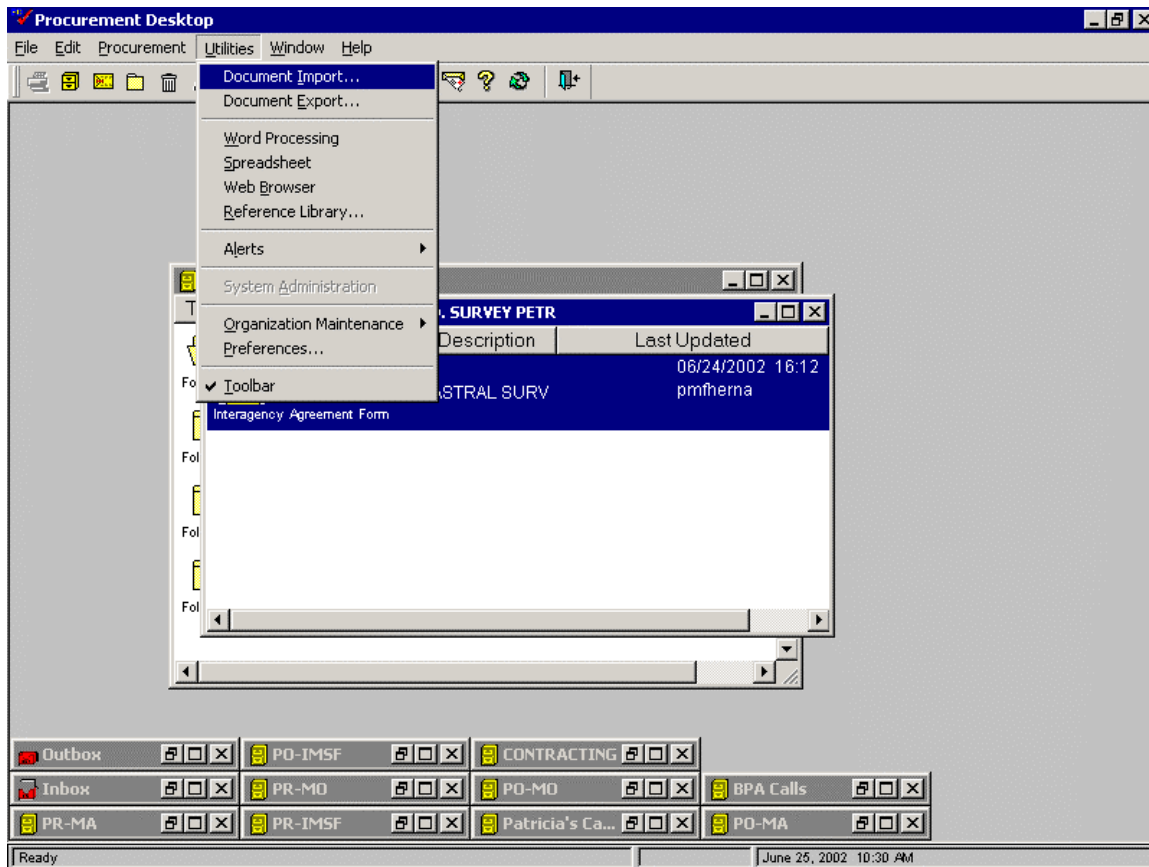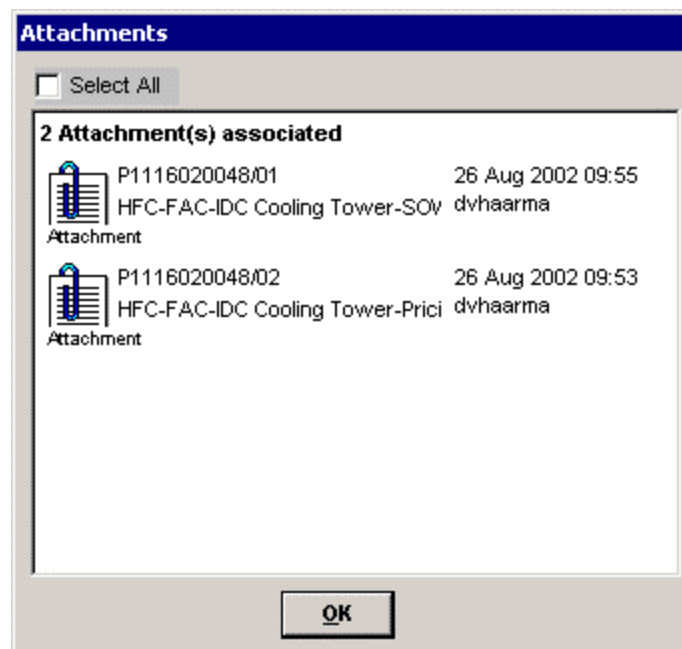
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

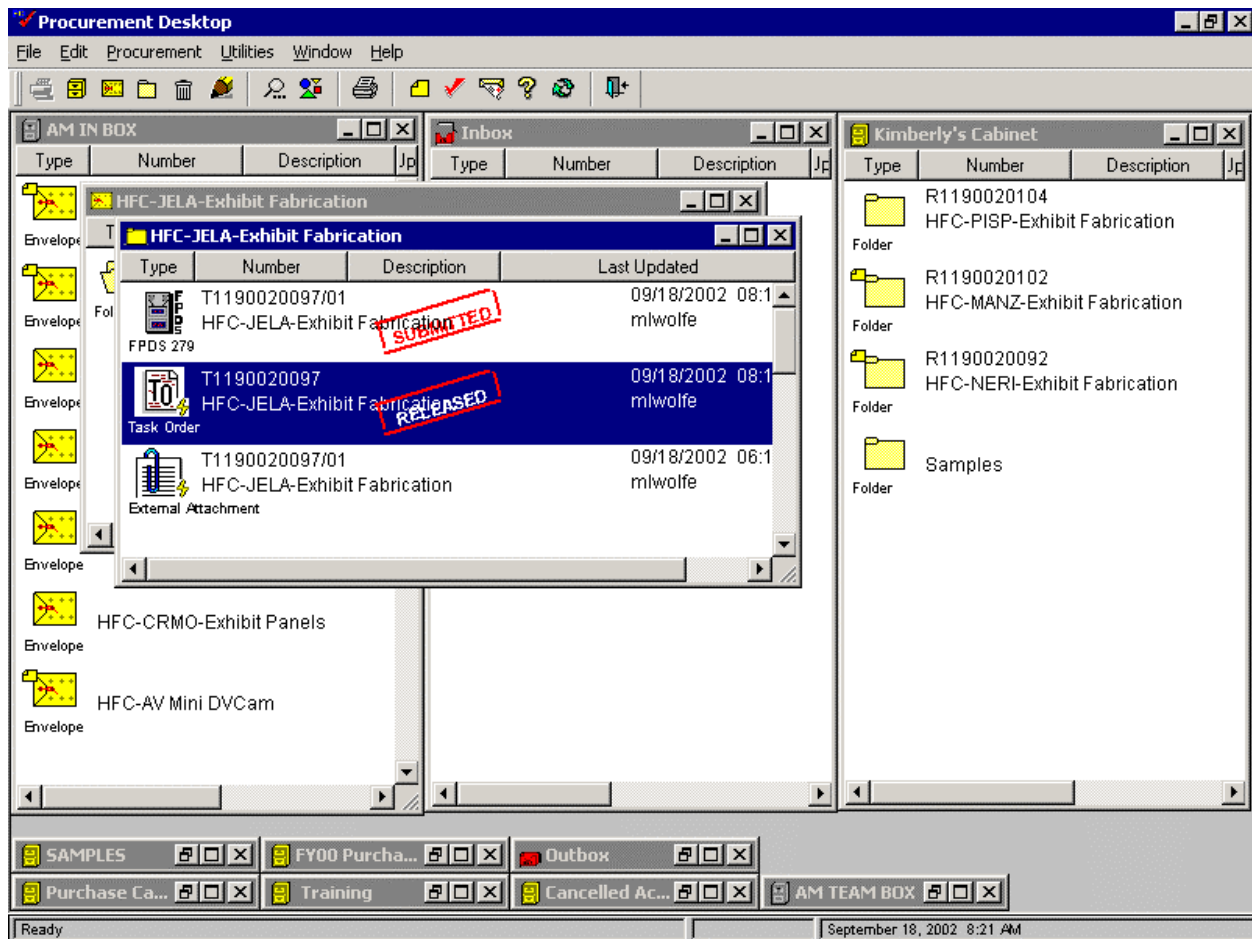**If you are obligating funds through this interagency acquisition agreement:**

4. Validate your document for Electronic Commerce transmission by choosing "Procurement," "EC Actions," and then "EC Validate."

5. Once the document has passed EC Validation, electronically submit by choosing "Procurement," "EC Actions," and then "EC Submit."

   You will be prompted for the document(s) that you want to attach to your award document. Highlight all that you want to attach or check the "select all" box if this applies.
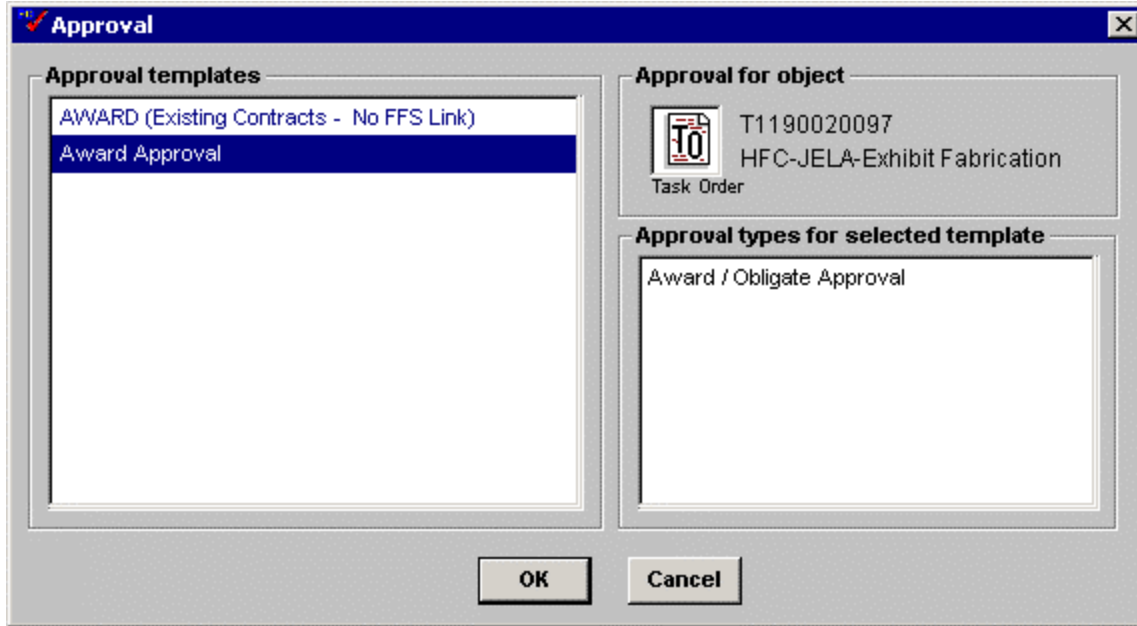
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6. Once you click okay, you document(s) will be issued and electronically awarded. A yellow lightning bolt will appear beside the document(s) that were submitted.
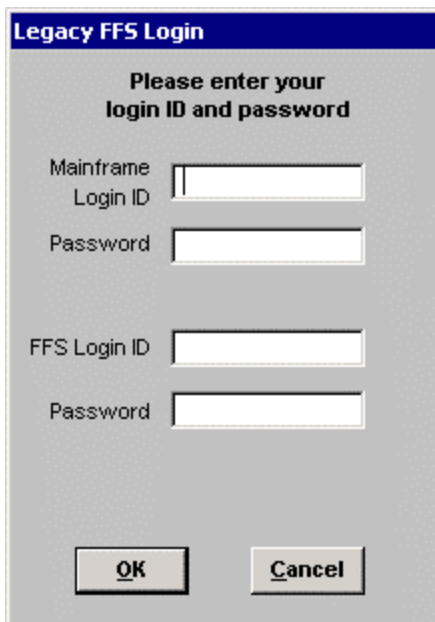
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

7. Approve using the "Award Approval" option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).

**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

**If not obligating funds through this interagency acquisition agreement:**

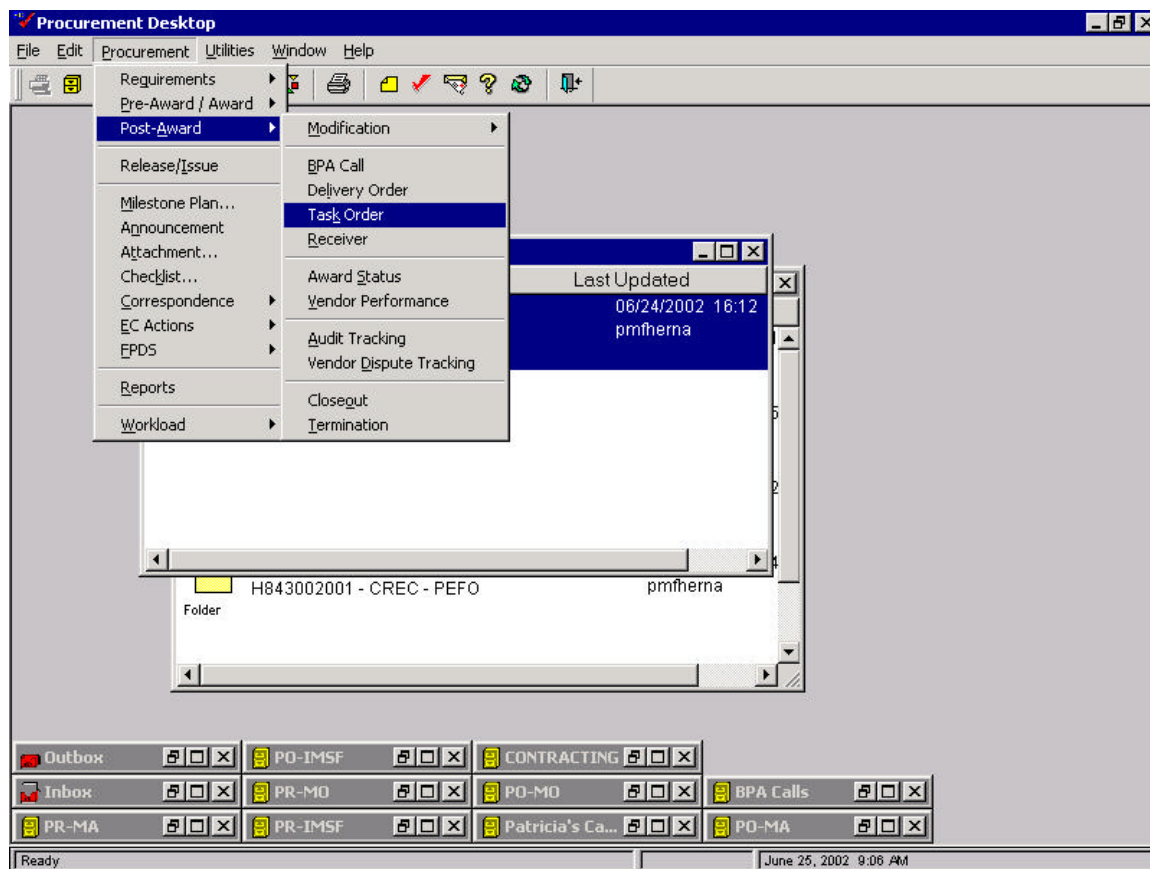4. Use the "AWARD (Existing Contracts – No FFS Link)" template.
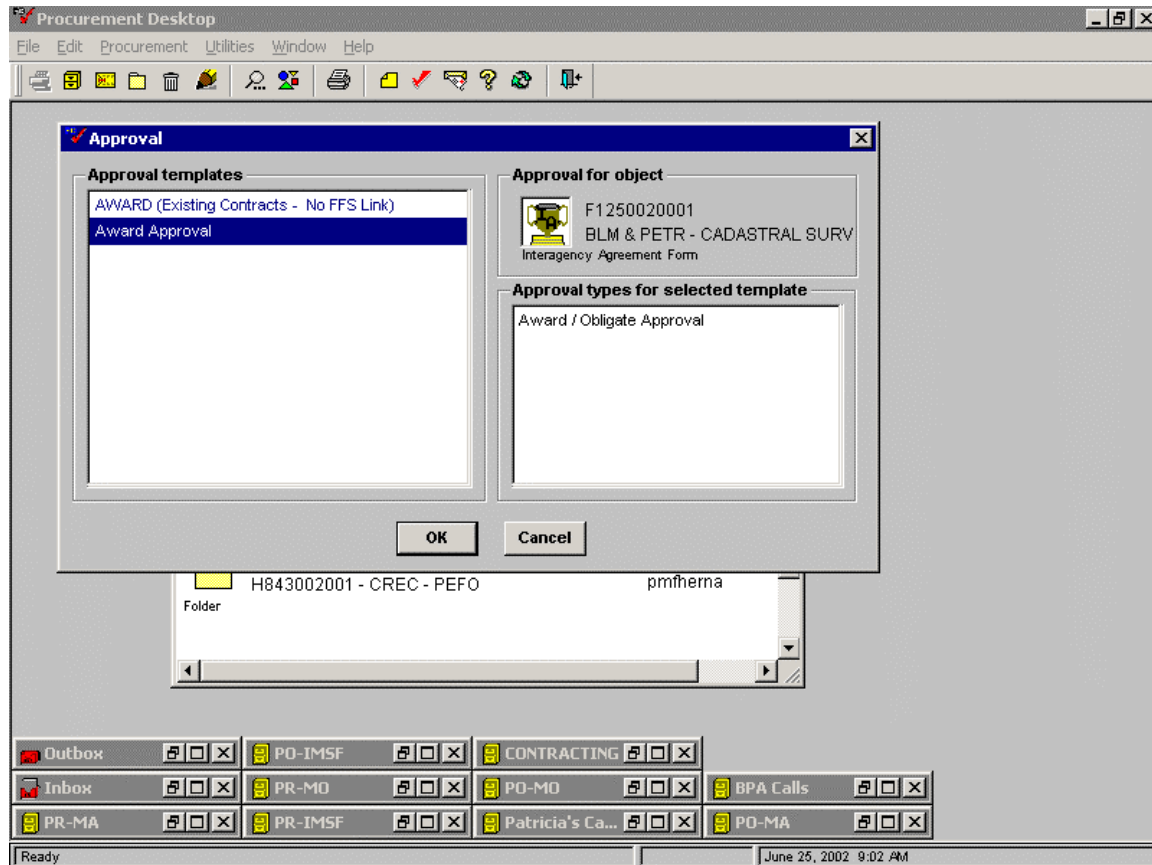


5. Once this template is "Approved," then go to "Procurement" and select "Release/Issue."

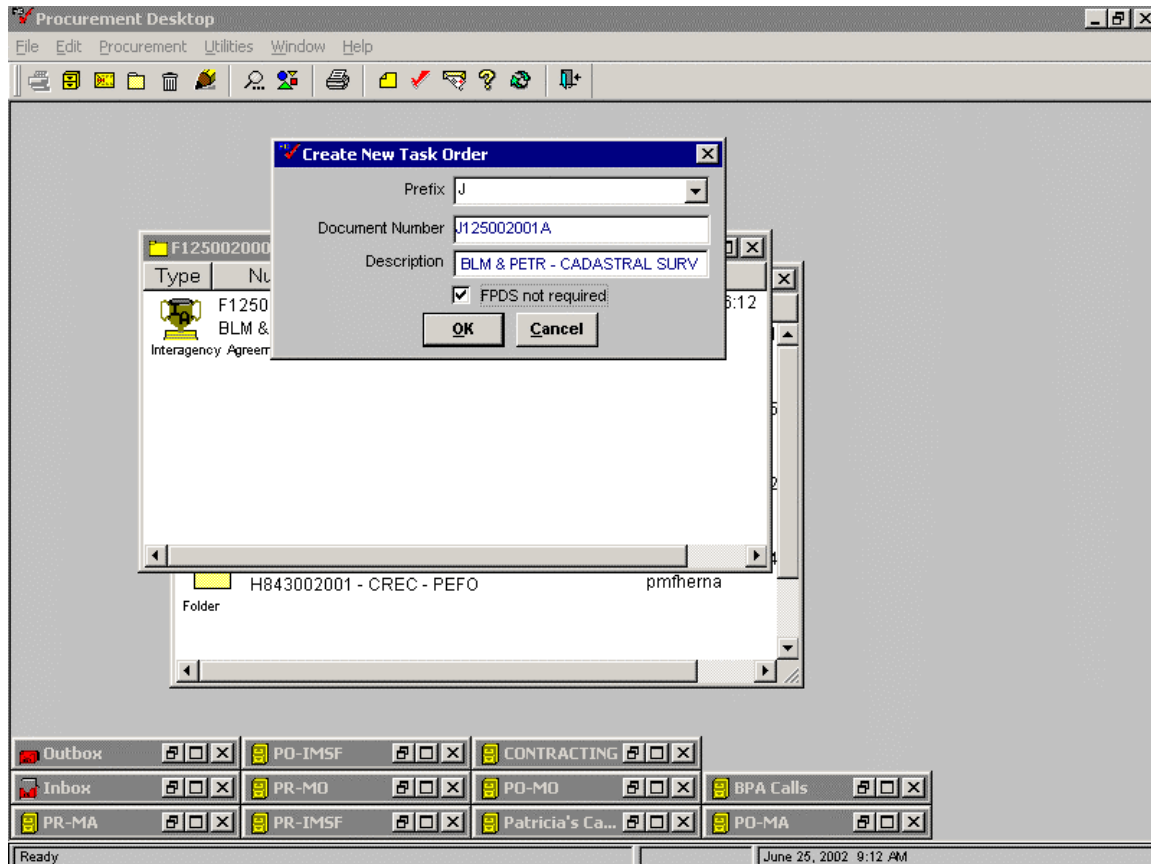**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

## CREATING A TASK AGREEMENT TO AN INTERAGENCY ACQUISITION AGREEMENT:

1.  Highlight the interagency agreement you created. Choose "Procurement," "Post-Award," and "Task Order."
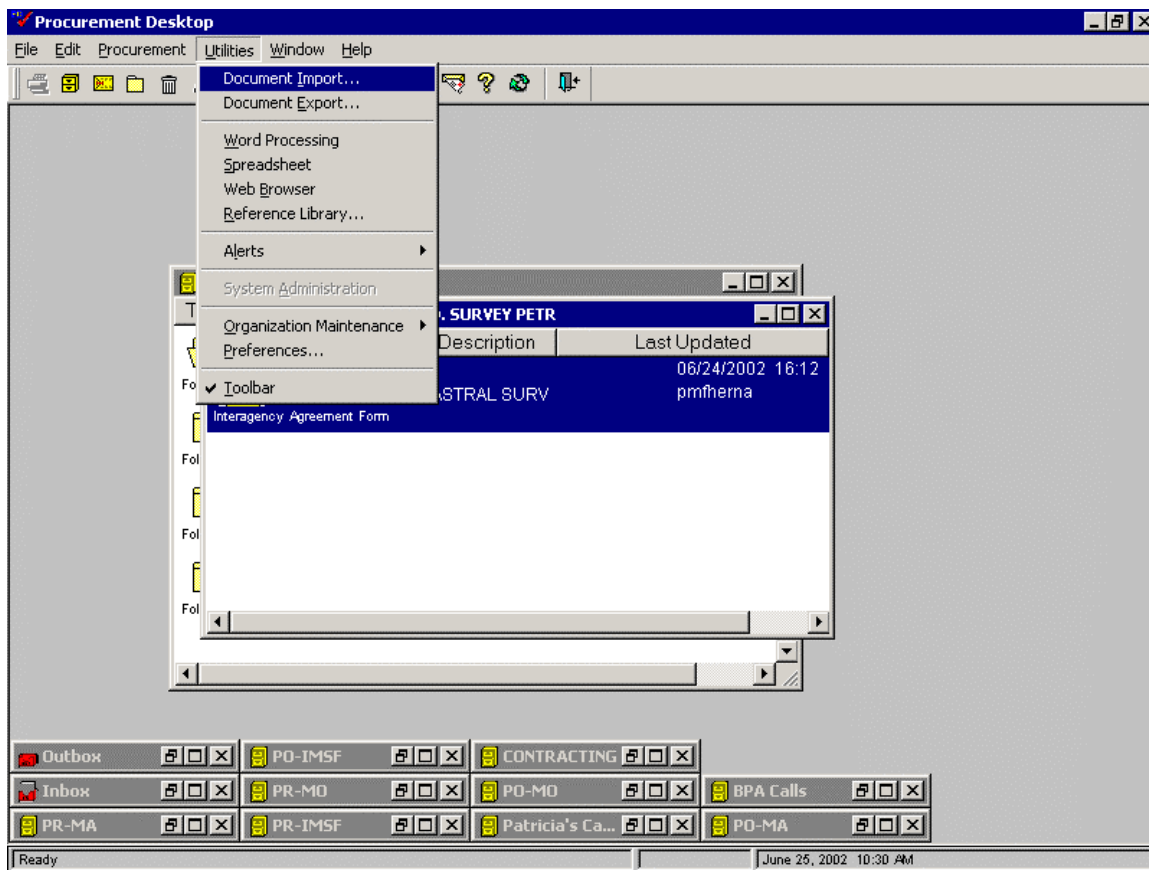
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

|  | **Org Code** | **FY** | **Sequential Number** |
|---|---|---|---|
| 2. Create a task agreement numbered as follows: **H** | {1 2 5 3} | 0 0 | {0 0 0 1} |

3. Choose the option "FPDS NOT REQUIRED."



4. Creation of the task agreement is for obligation purposes only. In the description of the purchase order type in a statement such as "This document serves as the obligation document for Task Agreement Number J _ _ _ _ _ _ _ _ _ issued under Interagency Acquisition Agreement Number H _ _ _ _ _ _ _ _ _ _. See task agreement and interagency acquisition agreement for more information."

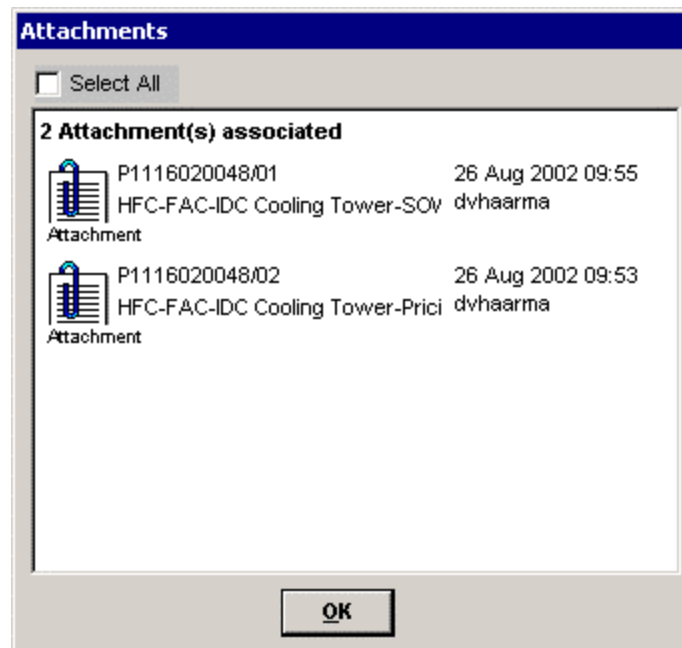**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

5. Attach a copy of the cooperative agreement to the OF-347. Go to "Utilities" and select "Document Import." The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.
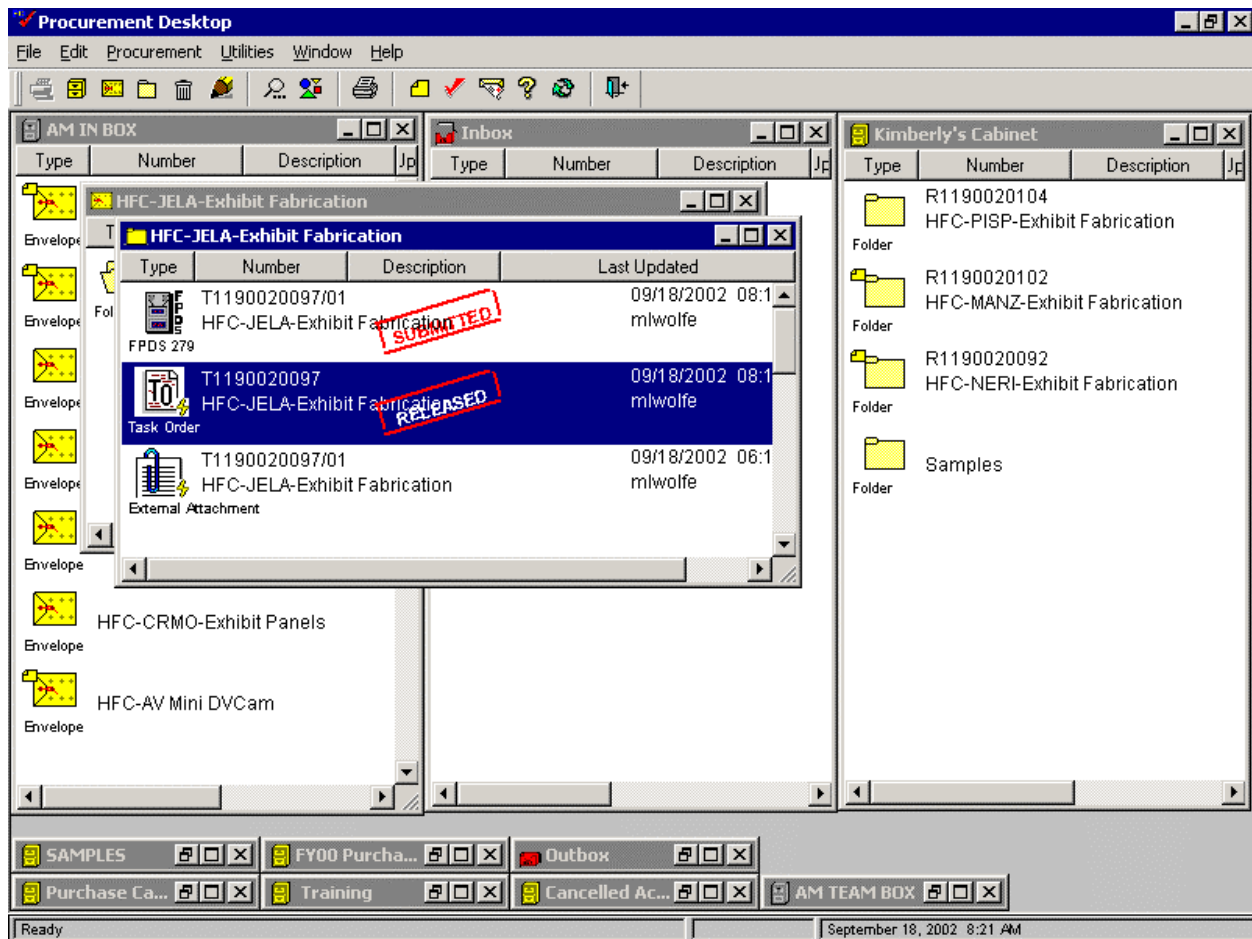
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

6.  Validate your document for Electronic Commerce transmission by choosing "Procurement," "EC Actions," and then "EC Validate."

7.  Once the document has passed EC Validation, electronically submit by choosing "Procurement," "EC Actions," and then "EC Submit."

    You will be prompted for the document(s) that you want to attach to your award document. Highlight all that you want to attach or check the "select all" box if this applies.
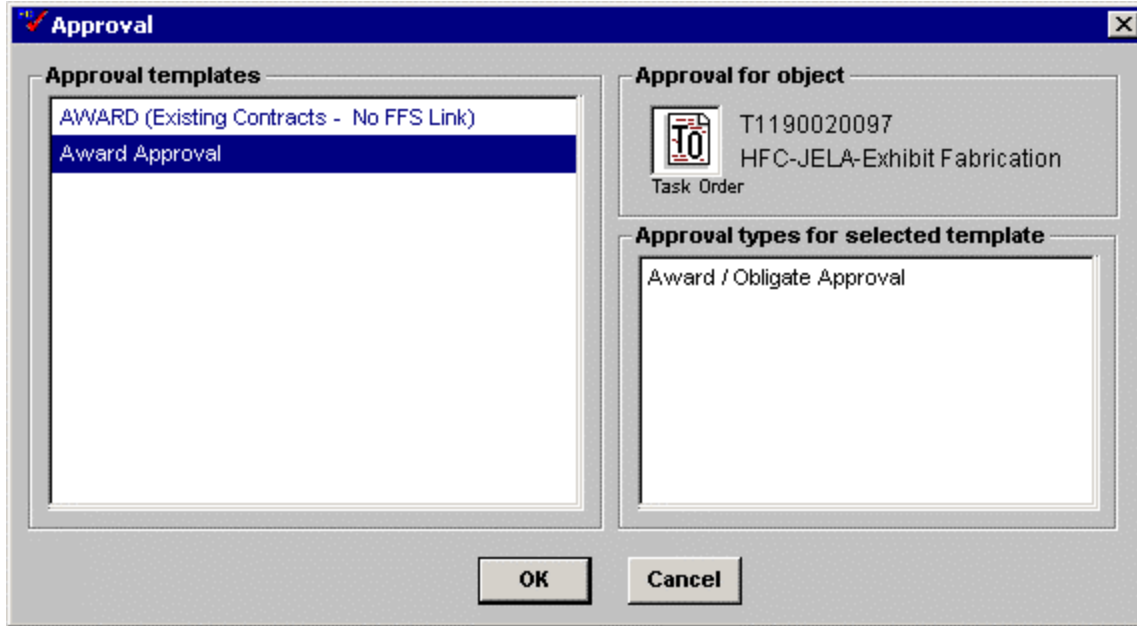
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

8. Once you click okay, you document(s) will be issued and electronically awarded. A yellow lightning bolt will appear beside the document(s) that were submitted.
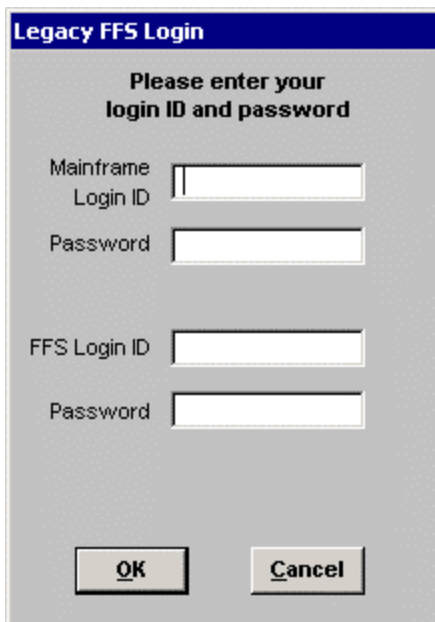
**OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP**

9.  Approve using the "Award Approval" option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).